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ABSTRACT

Supporting performance objective 4 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on planning work, establishing priorities, and carrying out the work in an orderly fashion are included in this packet. (The packet is the first in a set of three on supervising and implementing--CE 016 984-986.) The student materials include six clerical tasks to be prioritized and completed. The instructor's manual includes notes to the teacher and answer keys for the six tasks. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the three packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155473

SUPERVISING AND IMPLEMENTING

PLAN WORK FOR YOURSELF

STUDENT MANUAL

Prepared by

Pat Chapman

These materials support
Performance Objective 4 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation with

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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OE 016 984

I. LEARNING ACTIVITY PACKET ON PLANNING WORK FOR YOURSELF

Many secretaries are responsible for the operation of an entire office while their employer is out of the office. Therefore, it is important for students to learn to plan work for themselves, establish priorities and carry out the work in an orderly manner.

Clerical Tasks to be Performed.

Task No. 1 Type two letters from the rough copies given

Task No. 2 Manuscript (rough copy to be typed correctly)

Task No. 3 Itinerary

Task No. 4 Phone call to order items and interoffice memorandum

Task No. 5 Straighten supply cabinet (your folder).

Task No. 6 Send a telegram.

Students in office machines on the eleventh grade level and office procedures students on the twelfth grade level will be able to complete successfully this material within five class periods of 55 minutes each. The students should be allowed approximately five minutes of each period for assembling their materials.

II. PERFORMANCE OBJECTIVE

Given the clerical tasks listed above, the office machines or office procedures student will establish priorities for the tasks to be performed and will be able to complete all of the tasks with 98 percent accuracy within the one week deadline of 55 minutes per class.

III. PREREQUISITES

Typewriting I and experience typing business forms
Experience using a business phone
Preview transparency for block style letter

IV. LEARNING RESOURCES AND SUPPLIES

Typewriting text
Instructions for all tasks, including rough copies of manuscript, letter, itinerary
Phone book
Typing paper, carbon, other business forms needed

V. LEARNING ACTIVITIES

This week you are employed as a clerical worker in the office of Executive Personnel, Inc. You are to complete the tasks listed in I. Examine the tasks to be completed. Determine which tasks need to be completed first and assign priorities to these. Complete the tasks in logical order.

At the end of the time period allotted for each task (approximately 45 minutes), present the material to your instructor after you have proofread all items. You should submit some material each day.

Task No. 1

Type the following letter to the two persons listed below. Use block style with standard punctuation. Make necessary corrections. (If your school has a magnetic card typewriter, you may use it.)

Miss Mary S. Jones
4263 West Oak Street
Elvin, SC 29209

Ms. Marguerite L. Taylor
101 Norman Road
Madison, SC 21683

Current Date

Dear

Thank you for your letter regarding the requirements and training for the position of an executive administrative assistant with our company.

Persons who are employed in this job are high school graduates with a background in office occupations. Since our company has many departments, some of our employees have been trained in the stenographic, clerical and accounting and data processing fields.

For the clerical field in which you indicated an interest, one must be proficient in typing with a minimum speed of 60 words a minute. Employees must be able to operate the ten key adding machine, electronic calculator, copier, executive typewriter, transcriber and, in some cases, the automatic typewriter.

If you wish to come for an interview you should call Mr. Ian Hanahan who is our personnel director. He will be happy to discuss the job opportunity which our company offers. His telephone number is 787-2610.

Sincerely yours,

Sam T. Williams
Executive Vice President

phc

Task No. 2

Using the rough copy of "Basic Styles of Business Letters," type one corrected copy Use standard procedure for typing a manuscript. It is not bound and has no footnotes.

TASK # 2

BASIC STYLES OF BUSINESS LETTERS

There are five basic styles of business letters which are used by businesses for correspondence. Some businesses set rigid standards for use by their typists; others may leave the choice of letter style to the secretary or typist. Many companies include additional items, such as reference lines or company signature, depending upon the needs of the company. Once a student has learned the basic style, it will be easier to adapt to any variation used by the company that later employs the student.

MODIFIED BLOCK STYLE OR BLOCKED STYLE. This style letter is used by most businesses because it is an attractive letter style and can be typed with ease since only one tab stop needs to be set. The date line for an average length letter in this style is normally typed on line 15.

Usually four blank lines are left between the date and the letter or inside address. One blank line is left between the salutation and the body of the letter. Unless the letter is very short, the paragraphs are single spaced with a double space between paragraphs.

There is one blank line between the body of the letter and the complimentary closing. Three blank lines are left between the complimentary closing and the signature. If the person writing the letter did not type it also, the typist's reference initials are typed a double space below the signature at the left margin.

If an enclosure notation is needed, it is typed on the next line following the typist's reference initials. Some authors prefer to single space reference initials, enclosure notation and carbon copy notations. Some authors double space these items. Both ways are correct. The typist should use one way consistently.

FULL BLOCKED OR BLOCK STYLE. This style letter is the easiest and quickest to type because all lines are blocked at the ~~right~~ LEFT margin. The secretary does not have to set any tab stops for this style. The same number of blank lines would be left between the various parts of the letter as in Blocked or Modified Block style.

MODIFIED BLOCK STYLE WITH INDENTED PARAGRAPHS OR SEMIBLOCKED STYLE. The date line, complimentary closing and signature lines are typed at the center when using this style. The inside address, salutation, reference initials, enclosure notations and carbon copy notations are typed at the left margin. The first line in each paragraph is indented (5) spaces. This letter has a pleasing appearance and is easy to type because the ~~man~~ person typing it must set only two tab stops.

INDENTED STYLE. This letter style is seldom used in business because it is more time consuming to type.

A five space indention must be set for each line in the inside address and complimentary closing. The typist must also remember to tab over the correct number of times for the line to be typed. In an office with a great deal of correspondence, this style would take

too much of the typist's time to be useful. It is, however, an attractive style and some businesses may prefer it.

AMS SIMPLIFIED STYLE. The style letter advocated by the Administrative Management Society is a simplifed style which eliminates the salutation and complimentary closing. All lines are blocked at the left margin. The date line is usually typed on line 15 or a double space below the letterhead (if one is used). The inside address is typed four lines below the date (leaving three blank lines). Between the inside address and the subject line, leave two blank lines. A subject line is always included in the AMS Simplified Style. Leave two blank lines after the attention line. Type the paragraphs single spaced, but double space between them. The writer of the letter and that person's title are typed, leaving at least 3 blank lines below the body of the letter for the writer to sign it. Reference initials are typed a double space below the writer's name.

Task No. 3

Using the correct form, type the itinerary for Mr. Sam T. Williams for next week; supply dates beginning with Monday of the week following the one in which you start this project.

Monday (supply date)	Travel to Charleston to speak at Recruitment Seminar at 10:00 a.m. Luncheon at 1:00 p.m. at Mills Hyatt House
Tuesday	Office appointments: 9:30 a.m. Ms. Cheryl Brocke 2:45 p.m. Miss Dixieana Cauthen
Wednesday	Depart Columbia at 8:32 a.m. on Delta 646; arrive in Atlanta at 9:46 a.m. for meeting of National Recruiters Association
Thursday	Squire Inn Motel, Atlanta, Conference
Friday	Depart Atlanta 7:45 a.m. Return to Columbia 9:00 a.m. Office, Staff Meeting at 2:00 p.m.

Task No. 4

Part 1 Phone call

Place a phone call to the local office supply store in your city to inquire about prices of the following items.

1 Ream mimeo paper

1 Desk blotter

1 Stapler

1 Box staples (Get prices for various brand names.)

Webster's Collegiate Desk Dictionary (latest edition)

Part 2 Interoffice memorandum

After the phone call, prepare an interoffice memorandum to your boss, Mr. Sam Williams, listing the prices for which he asked.

Task No. 5

At the best time, straighten your supply cabinet (your own folder) and determine any purchases you need to make for next week's work. Consider items such as carbon paper, bond paper, erasers, pens, steno pads, etc.

After you complete this task, inform your instructor and turn in the list you have made for your purchases.

Task No. 6

Type a telegram.

Using a telegram form, send a full-rate telegram to Mr. John Harbourt, 101 Seminary Road, New Orleans, LA 46579, Telephone AC 504 406-2292.

Mailing today contract for position as Assistant Director, Administrative Services. Sign, return both copies immediately./ Sam T. Williams/Executive Vice President/Executive Personnel, Inc./

Student _____

Date _____

PLAN WORK FOR YOURSELF

Instructor's Final Checklist

Check the student's performance in the following elements of planning work for yourself.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

		Student Performance			
		Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1.	Assigned proper priorities to work	[ ]	[ ]	[ ]	[ ]
2.	Organized work in logical sequence	[ ]	[ ]	[ ]	[ ]
3.	Allowed adequate time for completion of tasks	[ ]	[ ]	[ ]	[ ]
4.	Located necessary supplies and information	[ ]	[ ]	[ ]	[ ]
5.	Met all deadlines	[ ]	[ ]	[ ]	[ ]

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INSTRUCTOR'S MANUAL

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NOTES TO TEACHER

The logical order for completing the tasks in this module would be:

telegram
phone call
interoffice memo
letters
manuscript
itinerary
straighten supply cabinet

It may be necessary for you to make special arrangements for the student to use the phone to complete Task 4. Call this to the student's attention and advise when to make the phone call. Provide a local telephone directory.

For Task 5, the student may inventory his/her supplies or the instructor's supply cabinet. It may be more manageable to permit the student to check his/her personal items and then perhaps type a purchase requisition as in a large office. A simple purchase requisition form is provided.

You will need to provide telegram forms for Task 6. A pad of these forms may be obtained free of charge from the telegraph office.

The Instructor's Checklist, page 11, is a perishable item and should be duplicated for your use in evaluating each student's performance.

Check the Learning Resources and Supplies list given on page 1 of the Student Manual to make sure everything that the student will need to complete this module is provided.

Keys for the tasks where appropriate are provided in your manual.

KEY

Task No. 1

Current Date

Miss Mary S. Jones
4263 West Oak Street
Elvin, SC 29209

Dear Miss Jones:

Thank you for your letter regarding the requirements and training for the position of an executive administrative assistant with our company.

Persons who are employed in this job are high school graduates with a background in office occupations. Since our company has many departments, some of our employees have been trained in the stenographic, clerical, accounting and data processing fields.

For the clerical field in which you indicated an interest, one must be proficient in typing with a minimum speed of 60 words a minute. Employees must be able to operate the ten key adding machine, electronic calculator, copier, executive typewriter, transcriber and, in some cases, the automatic typewriter.

If you wish to come for an interview, you should call Mr. Ian Hanahan who is our personnel director. He will be happy to discuss the job opportunity which our company offers. His telephone number is 787-2610.

Sincerely yours,

Sam T. Williams
Executive Vice President

phc

KEY

Task No. 1

Current Date

Ms. Marguerite L. Taylor
101 Norman Road
Madison, SC 21683

Dear Ms. Taylor:

Thank you for your letter regarding the requirements and training for the position of an executive administrative assistant with our company.

Persons who are employed in this job are high school graduates with a background in office occupations. Since our company has many departments, some of our employees have been trained in the stenographic, clerical, accounting and data processing fields.

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KEY

TASK NO. 3

There are several correct formats for typing itineraries. The following is one form:

ITINERARY OF SAM T. WILLIAMS
(SUPPLY DATE)
CHARLESTON, ATLANTA, AND COLUMBIA

MONDAY, (SUPPLY DATE): CHARLESTON

7:00 a.m.	Travel to Charleston
10:00 a.m.	Speak at Recruitment Seminar
1:00 p.m.	Luncheon, Mills Hyatt House
3:00 p.m.	Depart Charleston for Columbia

TUESDAY, (SUPPLY DATE): COLUMBIA

	Office appointments:
9:30 a.m.	Ms. Cheryl Brocke
2:45 p.m.	Miss Dixieana Cauthen

WEDNESDAY, (SUPPLY DATE): COLUMBIA AND ATLANTA

8:00 a.m.	Travel to airport
8:32 a.m.	Depart Columbia on Delta 646
9:46 a.m.	Arrive Atlanta
1:00 p.m.	Meeting of National Recruiters Association, Squire Inn Motel

THURSDAY, (SUPPLY DATE): ATLANTA

	Conference, Squire Inn Motel

FRIDAY, (SUPPLY DATE): ATLANTA AND COLUMBIA

7:45 a.m.	Depart Atlanta on Delta 707
9:00 a.m.	Arrive Columbia
2:00 p.m.	Office – Staff meeting

KEY

TASK NO. 4

Part 2

MEMORANDUM

TO: Mr. Sam Williams

FROM: Student's Name

DATE: Current

SUBJECT: Prices for Office Supplies

Mrs. James of City Office Supply quoted prices for the following office supplies:

1 ream white mimeo paper	5.02
1 desk blotter	.50
1 desk stapler	
Swingline	11.95
Bostitch	10.95
1 box staples	
Standard (fits Ace and Swingline staplers)	1.80
Bostitch B-8	1.95
1 Webster's Collegiate Desk Dictionary (Eighth edition)	10.95

xxx

western union

KEY
TASK NO. 6

Telegram

XII A–21

NO. WDS – CL. OF SVC.	PD. OR COLL.	CASH NO.	CHARGE TO THE ACCOUNT OF	[ ] OVER NIGHT TELEGRAM UNLESS BOX ABOVE IS CHECKED THIS MESSAGE WILL BE SENT AS A TELEGRAM
			Executive Personnel, Inc.	

Send the following message, subject to the terms on back hereof, which are hereby agreed to

Current 19

TO Mr. John Harbourt

CARE OF OR APT. NO.

STREET & NO. 101 Seminary Road

TELEPHONE 504-406-2292

CITY & STATE New Orleans, LA

ZIP CODE 46579

MAILING TODAY CONTRACT FOR POSITION AS ASSISTANT DIRECTOR, ADMINISTRATIVE SERVICES. SIGN, RETURN BOTH COPIES IMMEDIATELY.

SAM T. WILLIAMS

SENDER'S TEL. NO. 245-3115

NAME & ADDRESS Sam T. Williams, Executive Vice President, Executive Personnel Inc.

western union

Telegram

NO. WDS – CL. OF SVC.	PD. OR COLL.	CASH NO.	CHARGE TO THE ACCOUNT OF	[ ] OVER NIGHT TELEGRAM UNLESS BOX ABOVE IS CHECKED THIS MESSAGE WILL BE SENT AS A TELEGRAM

Send the following message, subject to the terms on back hereof, which are hereby agreed to

19

TO

CARE OF OR APT. NO.

STREET & NO.

TELEPHONE

CITY & STATE

ZIP CODE

DUPLICATE

SENDER'S TEL. NO.

NAME & ADDRESS

PURCHASE REQUISITION

Deliver To: _____ Date: _____

Location: _____ Date Required: _____

QUANTITY	DESCRIPTION